

# CUSTOMER WORKSHOPS MADE EASY

## Checklist

### Casting (Pre-planning)

- ☐ Begin conversations with customer 6-7 months in advance
- ☐ Identify workshop objective
- ☐ Identify project manager (logistics)
- ☐ Identify core planning team

### Set Design (Planning)

- ☐ Begin planning 4- 5 months in advance
- ☐ Schedule Project Launch/Kickoff Meeting (establish roles and responsibilities)
- ☐ Determine budget (based on takeaway items, food, printing, venue, travel costs, table and linen rentals, audio/visual equipment.
- ☐ Visit venue and submit request for proposals (if off-site)
- ☐ Identify speakers (internal and external)
- ☐ Identify participants
- ☐ Determine theme (if appropriate, should be based on audience/invitees)
- ☐ Order/develop props (tools/resources )( i.e. directory, recipe book, thumb drives, folders, giveaways)
- ☐ Determine use of social media (i.e. polleverywhere.com)
- ☐ Identify graphic designer and graphics needs
- ☐ Book a facilitator or emcee
- ☐ Identify ambassadors (Traveling RAMs and regional support)
- ☐ Schedule content reviews and dry run

### Set Design (Communications Planning)

- ☐ Determine branding
- ☐ Determine materials needed to be printed
- ☐ Develop electronic materials
- ☐ Order event "schwag"

### Set Design (Ambassador Training)

- ☐ Involve ambassadors early in process
- ☐ Provide ambassador training (determine roles/responsibilities)

### Set Design (Audio and Visual Preparation)

- ☐ Determine personnel who will run AV (microphones/sound system) if in-house
- ☐ Work with interior designer for a room layout
- ☐ Work with AV personnel or tech to determine needed equipment from IT or to rent
- ☐ Decide if you want any of the workshop/ presentations video recorded for future usage (i.e. training)
- ☐ Determine if photography of the event will be needed and determine photographer (i.e. directory)
- ☐ Develop a music playlist for breaks and other icebreaker type activities

### Script (Agenda)

- ☐ Determine workshop format (number of days, general session, breakouts, etc.)
- ☐ Review customer feedback (if surveyed)
- ☐ Identify presenters
- ☐ Notify presenters
- ☐ Send presenters calendar of deadlines
- ☐ Set tentative agenda
- ☐ Incorporate customer feedback
- ☐ Incorporate internal feedback
- ☐ Set final agenda

### Publicity

- ☐ Send save the date with survey (depending on customer)
- ☐ Send invitation with RSVP and tentative agenda items with DFC Visitors Guide/Map,
- ☐ Visitors Guide and other hospitality materials
- ☐ Send final agenda to customers, presenters and all attendees
- ☐ Send presenters calendar invites for content review, dry run and actual workshop presentation
- ☐ Send post event questionnaire to all participants (may be separate for internal and external customers)
- ☐ Send thank you notes (external and internal)

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### Rehearsals

#### Content Review

- ☐ Make space reservation or contract a venue for the event
- ☐ Send save-the-date to presenters and core team
- ☐ Save presentations/outlines or ask presenter to bring presentation on flash drive
- ☐ Provide feedback and suggestions to presenters

#### Dress Rehearsal (Dry Run)

- ☐ If possible have it at workshop venue (two weeks before workshop)
- ☐ Make space reservation (Brenda)
- ☐ Send save-the-date to presenters and core team
- ☐ Make an IT service call for equipment set up
- ☐ Save all dry-run presentations
- ☐ Receive feedback from leadership
- ☐ Coordinate logistical support microphones, music, etc.

#### Preview (Event Set-up)

- ☐ Set-up tables and stage
- ☐ Coordinate extra recycle and trash bins from building manager or hotel/venue
- ☐ Setup and test audio and visual equipment
- ☐ Setup registration table with all giveaways and folders
- ☐ Setup cyber café with a few wireless laptops with Internet access

#### Curtain

- ☐ Registration
- ☐ Welcome
- ☐ Introductions
- ☐ Icebreaker

### Act I

- ☐ Help emcee/facilitator manage agenda
- ☐ Manage presenters (on deck area) and get the stage ready
- ☐ Facilitate Q&A after each presentation (emcee/ambassadors microphone runners)
- ☐ Answer parking lot questions

### Act II

- ☐ Manage food and beverage orders and refills (ambassadors)
- ☐ Provide hospitality for networking activities
- ☐ Host meet and greet first afternoon of workshop
- ☐ Provide hospitality to hotels

### Curtain Call

- ☐ Provide Closing Remarks from leadership
- ☐ Get final thoughts and feedback from attendees
- ☐ Recognize core planning team and working staff
- ☐ Provide hospitality to hotels/airport

### Encore

- ☐ Schedule a hot wash meeting save for next workshop
- ☐ Send thank you notes internal / external
- ☐ Send survey to all attendees (internal and external)
- ☐ Follow-up with unanswered questions or materials promised

### The End

- ☐ Attend the premiere after party